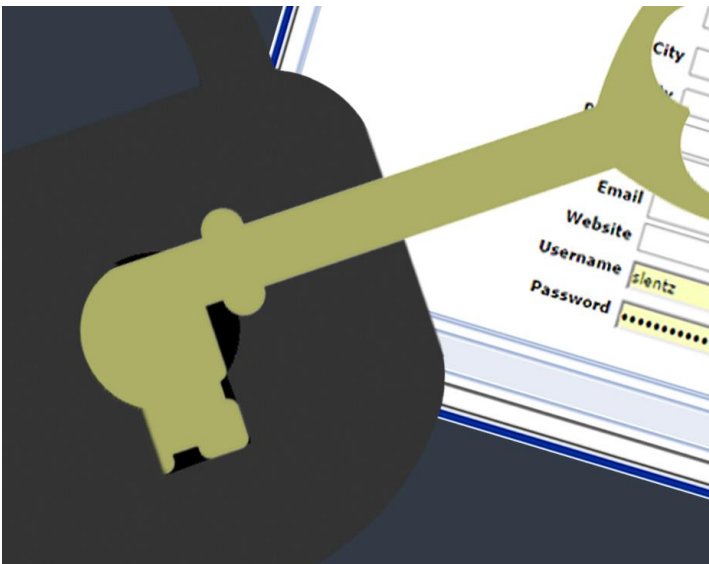# SAGE

Agency New User Manual
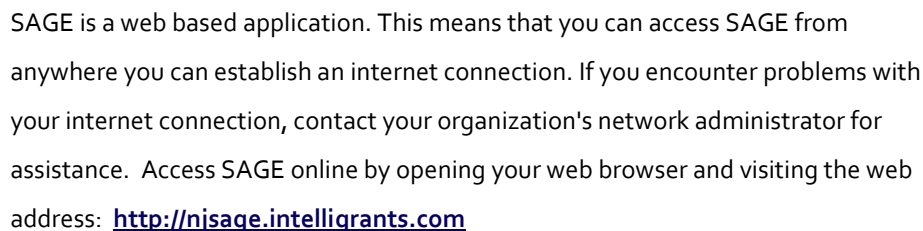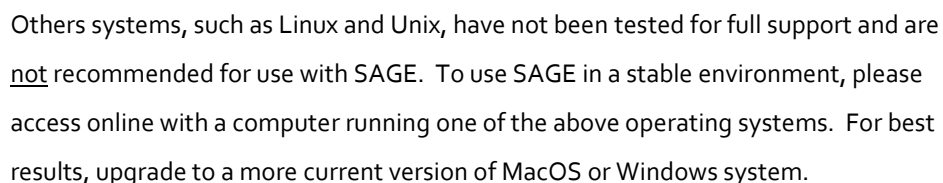
New Jersey Department of Health
System for Administering Grants Electronically
(NJDOH SAGE)

Instructions for applicant and grantee agencies' new user setup, initial use, and basic operation.

Table of Contents

Welcome to NJ Department of Health SAGE

NJDOH SAGE is the State of New Jersey Department of Health System for Administering Grants Electronically. Applicant and grantee agencies are required to use NJDOH SAGE to apply for, manage and report on awards of NJ Department of Health (NJDOH) funding. NJDOH SAGE is accessed online, but it is important to read through the system requirements and recommendations below to ensure your computer is properly set up for access.

Computer System Requirements

Windows 95 (or higher) –OR– MacOS 7.5 (or higher)
Others systems, such as Linux and Unix, have not been tested for full support and are not recommended for use with SAGE. To use SAGE in a stable environment, please access online with a computer running one of the above operating systems. For best results, upgrade to a more current version of MacOS or Windows system.

Access SAGE Online

SAGE is a web based application. This means that you can access SAGE from anywhere you can establish an internet connection. If you encounter problems with your internet connection, contact your organization's network administrator for assistance. Access SAGE online by opening your web browser and visiting the web address: **http://njsage.intelligrants.com**
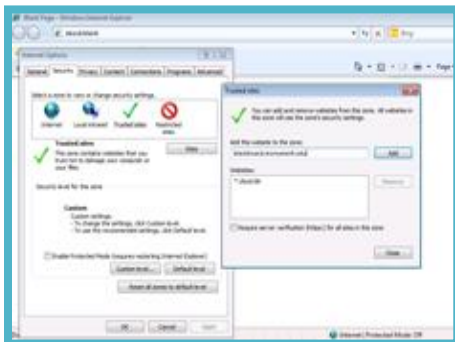
Recommended Browsers

Internet Explorer (IE 9 or higher), Chrome, Firefox, Safari. To best access and operate SAGE, it is recommended to upgrade to the most current version of one of these web browsers.

Also, check your browser preferences, settings and /or tools for additional configuration options.

For example: if using **Internet Explorer (IE) Version 9 (or higher)** to access SAGE, it is recommended to make the following configuration change in Internet Explorer to add the SAGE homepage to your list of trusted sites. Find the **Tools** Menu > Select **Internet Options**"> Click the **Security** Tab > Click **Trusted Sites** < Click the **Sites** Button > In the **Add this Web Site to the Zone** textbox type **http://njsage.intelligrants.com** and click the **Add** button. Click **OK** until the settings windows are completely closed out.

Adobe Acrobat Reader

Grant documents may be viewed in "Portable Document Format" (PDF), denoted by .pdf extension next to the file name. All documents in SAGE are automatically generated as PDF. Adobe Acrobat Reader is used to view / read PDF files. In order to use Adobe Acrobat Reader, you must download and install the latest version on your computer. Once installed, use Adobe Acrobat Reader to view, print, or save SAGE documents. Get Adobe Acrobat Reader free at **www.adobe.com**

Note: *NJDOH SAGE is also referred to as **"Blue" SAGE**. Be sure that you are logged into the correct version of the SAGE system by accessing it online via the link provided in this section. DCA SAGE, also known as "Green" SAGE is a separate system. You will know you are logged into NJDOH SAGE by confirming that the color featured on screen is predominately BLUE rather than GREEN.*

Getting Started with NJDOH SAGE

Once your computer is set up according to the requirements outlined in the previous section, you can then get started establishing your agency on NJDOH SAGE. But first... Understand that SAGE operates upon two basic principles:

Security Level Roles and Permissions. Access to certain functions within the system is determined by security role, and permissions are set according to the role a user is assigned in SAGE. Some security roles have permission to give agency personnel access to applications and related documents. Related documents are used to manage your grant, once awarded.

Grant Document or Application Status. In NJDOH SAGE, actions (like submitting a grant application) are performed by a change in "status". Only 2 of the 3 Security Roles in SAGE are capable of changing the status of an application or document.

Take a moment to learn about the three **Agency Security Roles** in NJDOH SAGE. Consider who among your personnel will be *assigned* in SAGE according to the *security permissions* associated with each role.

Authorize Officials (AO) and Agency Administrator (AA) have the same levels of security permission. These are the security roles granted permission to search for grant programs, initiate, cancel or submit a grant or document. They can also: enter, update and delete information; download and attach files; monitor or check the status of a grant application or document; and grant permission to agency personnel to access and work on a document, grant or application.

Agency Staff (AS) security roles are set so that Agency Staff can enter, update and delete information on applications only where permission is granted by and Agency Administrator or Authorized official. Once granted access to an application, this role can complete forms or related documents, download and attach files, modify or edit information and monitor grant or application status.

- **Authorized Officials**
- **Agency Administrator**
- **Agency Staff** (not permitted to create / submit documents or manage personnel on SAGE)

Note: *Your Authorized Official is usually the top executive of your agency. For example, a City would register its Mayor as this role. Agency Administrator(s) should be able to make decisions in NJDOH SAGE on behalf of the Authorized Official.*

Contact the Department of Health

Most agencies are notified by Request for Applications (RFA) to apply for a grant program. RFAs are supplied by NJ Department of Health granting Divisions, for each grant program being offered. Refer to this RFA for contact information and request an **Organization Form** to initiate the process of registering your agency on NJDOH SAGE.

Complete the Organization Form

Once your agency has identified your Authorized Official, have them fill out the **Organization Form** using their contact information. The AO must sign the form and submit it via email attachment to the NJDOH SAGE Helpdesk. Contact information for the Help Desk will be supplied to you upon request. NJDOH staff will verify your information to ensure you meet our granting requirements and validate your agency in NJDOH SAGE. Your agency must be validated before any of your personnel may begin using NJDOH SAGE.

Exact Legal Organization Name _____

Identifier _____
Federal Tax I.D. Number _____
DUNS Number _____
Address_____
City_____ State _____Zip code _____
County _____ Phone _____
Email _____ Website _____
Individuals Names _____

Register Your Agency's Authorized Official

At the login screen, click on the New User link. Complete the **Contact Information** form for your Authorized Official and click **SAVE.** All fields marked with an asterisk (*) are mandatory. When the form is completed, you will be returned to the login screen. The Authorized Official will be assigned to your agency automatically when NJDOH validation is complete.
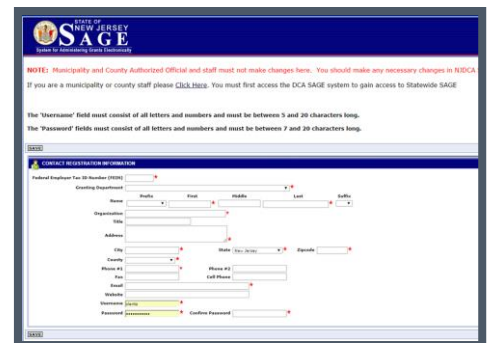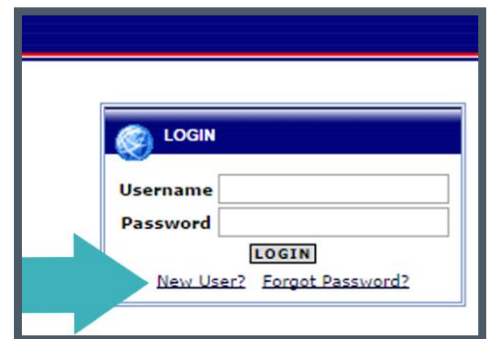
Note: *You will be notified via email or telephone that your agency has been validated. Once that occurs, you may proceed to the next step, on the next page. Once the organization has been validated, the AO can designate one or more Agency Administrators (AA). AA(s), as well as all Agency Staff (AS) must follow the directions on the next page to register as users on SAGE. When completed, the AO (or AA) must validate all newly registered users and assign them to your agency.*

Set-up SAGE User Accounts

At the login screen, click on the New User link. Complete the **Contact Registration Information** form and click **SAVE**. All fields marked with an asterisk (*****) are mandatory. When the form is completed, you will be returned to the login screen. Notify your agency's Authorized Official or Agency Administrator so they can validate you as a new user for your agency.

User Name and Password

Username

Letters and numbers - 5 to 20 characters

(example: abattle1, alb123, abattle, njpca12)

Password

Letters and numbers - 7 to 20 characters

Validating Users (for Agency Administrators and Authorized Officials)

Once the Authorized Official (AO) has created an account, and your agency is registered and validated by NJDOH, the AO must give new users access in NJDOH SAGE by following the instructions to **Validate / Attach Personnel to Your Agency** in the following section. At least one **Agency Administrator** should register as a new user and be validated by the AO first, so they can assist the AO in validating and managing additional users on the AO's behalf.
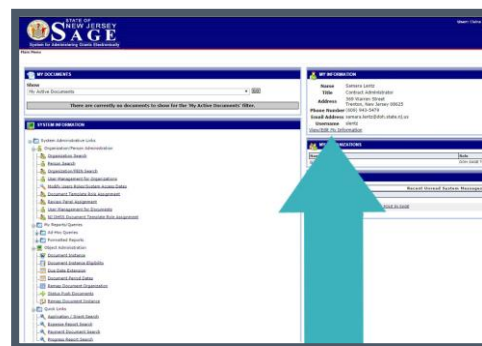
Changing Your User Profile Information

Log into NJDOH SAGE. From the **Main Menu** > select **My Information** > and click on **View/Edit My Information**. A contact information screen will appear. Edit the contact information fields and/or change your password. Click **SAVE**.

Note: *You cannot change your username once it has been established on SAGE.*

Changing Your Agency's Organizational Information

Certain fields are pre-populated from data entered elsewhere on the system. For example, the agency's **Organization Information** page pre-populates agency contact information on grant application or related documents. To change this information anywhere on the system, or for agency mergers and legal name changes, an AO or AA must contact the NJDOH SAGE Help Desk for assistance.
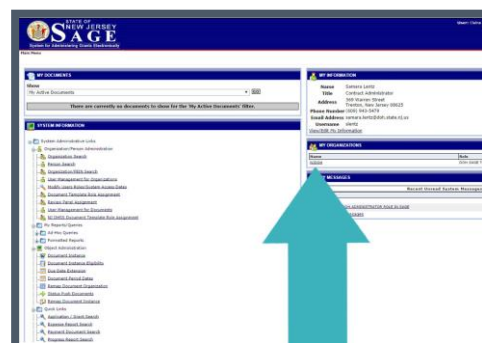
Forgotten Passwords and User Names

If you do not enter your user login credentials correctly the system will lock you out after 3 unsuccessful login attempts. Wait 15 minutes for the system to reset before you attempt to login to your account again.

If you have forgotten your user name: contact an AO or AA for assistance looking up your user account profile for your user name.

If you have forgotten your password: you can request a new password by clicking on the Forgot Password link on the login screen. On the **Forgot Password** screen, enter your login and email address. Your email must match the email address listed in your NJDOH SAGE profile in **Contact Registration Information**. Click **Email Me**, and your username and password will be emailed.
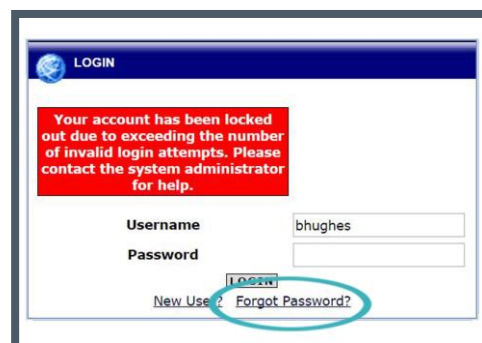
Registration in NJDOH SAGE does <u>NOT</u> automatically give a user account access to an agency's grants and applications!

You must contact an AO or AA for the next steps in obtaining access to your agency, its applications and related documents.   If you are the AO or AA of an agency, see the next section for further instruction.

Agency Administrator (AA) / Authorized Official (AO) Setup and Management Responsibilities

The Authorized Official, or top-most executive of an agency, does not have to work directly in SAGE following the initial setup described in the previous sections. The person(s) designated as the Agency Administrator can act on their behalf to conduct agency-wide grants management:

- **Managing agency NJDOH SAGE user accounts.**

- **Establishing / confirming eligibility for funding opportunities.**

- **Initiating and submitting applications and related documents.**

- **Assigning personnel to grants, applications and related documents.**

- **Entering and maintaining accurate Organizational Information.**

AAs or AOs Can Be Delegators

The AA or AO are the only roles that can initiate or submit an application, or related document. However, an AA or AO does not have to perform all of the work themselves. The everyday tasks can be delegated in SAGE to your personnel who are given the role of **Agency Staff**.   If you choose to delegate tasks to Agency Staff, be sure to read this section carefully to learn about the AA / AO responsibilities for managing personnel.

Being registered in NJDOH SAGE does <u>NOT</u> give users access!

Users must contact an AO or AA to be *validated*: assigned / attached to your agency as a member, given a security role, and granted access to applications and related documents. If you are the AO or AA of an agency, see this section for further instruction.

Validate / Attach Personnel to Your Agency

After logging into NJDOH SAGE, scroll below **My Information** to **My Organization** and click on the name of your agency. Your agency's information will appear. Find and click on the **Members** tab. In the **Search** field, enter the name of the person you wish to add to your agency. When you locate the correct person check the box next to their name, select a **Security Role** from the dropdown menu, and enter a **Start Date**. Click **SAVE** to associate the user with your agency and validate them.

Locate Eligible Funding Opportunities and Initiate Applications

From the **Main Menu**, see the **My Documents** section to view all of the programs for which you are eligible to apply. When you click on the name of the grant program a Create New link appears beneath it. Click it to initiate an application. Agree to the Terms and Conditions, Cost Controlling Initiatives, and Whistleblower Protection Act. If you have applied to this program in year prior, select from the dropdown menu the option to **carry data forward** from a previous year application.

Manage Your Active Grants and Applications

Once you create a new application, it will be assigned an application number and a link to that application will populate on the **Main Menu**, in the **My (Active) Documents** section, under the name of the grant program. You will note that the status of this application will be "*Application In Process*" until you submit the application. When logging back into NJDOH SAGE, click this link to return to the application or open the grant menu to monitor and manage progress.

Delegate Grant Work by Assigning Agency Staff to Programs

To add or remove your personnel to grant application, locate and click on the application number of the program to which you want to assign them. You will be brought to the **Application / Proposal Menu** > under **Management Activities** click on Add/Edit People. Use the search function to locate staff and select the appropriate name(s) from the search results. Check the box next to their name(s) and enter an access start date (or end date to remove). Click **SAVE.**

Completing and Submitting an Application for Funding in NJDOH SAGE

Once an AO or AA initiates an application for a grant program in NJDOH SAGE, and assigns appropriate personnel, any security role can fill out the application forms and pages. Use the following section to guide you through the process of completing and submitting an application.

Pay close attention to the application deadline located to the top-left of your **Proposal Menu. Agency Staff cannot submit an application**. The AO or AA must log in and submit an application in advance of the deadline. Please allow ample time to navigate any technical issues that may occur at the time of submission. If you do not have an option to submit, you have missed the deadline.

Access Grants and Applications

Once a new application has been created, and personnel are assigned it, that application / grant information will be accessible to assigned personnel via the **Main Menu**, in the **My Documents** section, when they log into NJDOH SAGE. Find the name of the grant program and click the program name; the application number should appear nested beneath it. Click on the application number to open the **Application / Proposal Menu**. This is how you will access documents and forms associated with an application / grant. For questions regarding access to a grant, application or document, contact your AA or AO. They may need to log on and use the Add / Edit People function to grant or remove access.
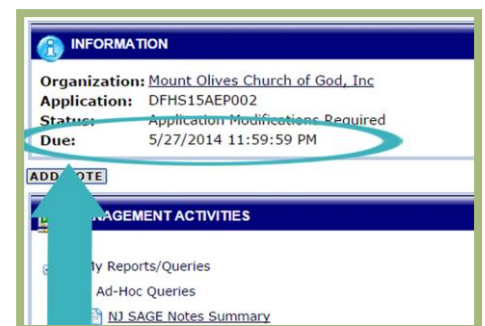

Note: *The status of this application will be "Application in Process" until the AA or AO submits the application. Contact your AA or AO regarding questions about the status of an application or document on SAGE.*

Filling Out Forms in the Application Forms Menu

The **Application / Forms Menu** is the main area in which agency personnel will work to complete an application or manage a grant. Not all forms (or pages in a form) must be completed, but if you begin a form / page you must complete or clear it, and click **SAVE** before it can be submitted. When pages are created, a number in parentheses will appear as part of that form's link to indicate the number of pages it contains. Click the link to access that form.
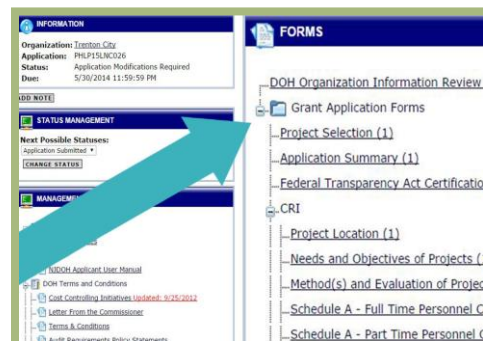
Navigating Forms and Pages

There are four basic methods for navigating the **Application / Forms Menu**.

- Navigation via the **Application Menu** dropdown (at the top of each form or page within a form)
- **Forms Menu** links on the right side of the **Application / Proposal Menu**
- Links listed in the **Related Pages** section of a form
- Clicking **Next, Previous, First** and **Last** buttons within a form

Tips for Completing Application Forms

Not everyone in each organization will have all of the information necessary to complete each form. Complete as much of it as you can and then click the **SAVE** button. Contact other personnel if needed to complete fields for which you do not have information. Fields followed by red asterisks (*) are required. Within some forms, you may need to create multiple pages of information. Use the **Add** button at the top of each page to add pages, sections, schedules, etc. and the **Delete** button to remove them. Once deleted, they cannot be recovered.

Note: *Pages and forms can ONLY be deleted while an application is "In Process" BEFORE submission to NJDOH for review.*

Note: *When cutting text from another program and pasting it into a form text field, SAGE may not recognize certain formatting, including tables, graphs, wing dings, photographs, bullets, and tabs. Be aware of the character limit of each text box. Exceeding the character limit will yield an error. The character limit is found at the bottom left of each text box.*

Cut and Paste: *When pasting content into a text field of an application form, first cut and paste text into any basic text editor, such as "Notepad" or "TextEdit". These plain text applications will have similar formatting to SAGE. Compose your text in one of these applications and paste them into SAGE; when finished click **SAVE.***

Automatic Calculations in Forms and Grant Documents

NJDOH SAGE will automatically calculate certain fields from numeric values already entered on forms and pages of an application. When you click **SAVE** the system will use the values that have been entered to calculate and populate un-editable fields. If certain values within an application do not coordinate accurately, an error message will appear and you will need to correct the discrepancy before the application can be submitted.

Error Messages

If any information is not completed in its entirety within an application form, or if there are mistakes, an error message will be displayed in red across the top of the page when you click **SAVE**. It is not necessary to correct form errors right away. You may return to the form and fix errors at any time. If errors are not fixed, however, the system will not allow an application to be submitted.
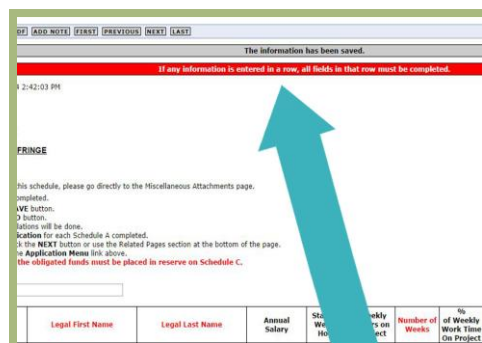
Uploads and Attachments

You may be required to upload and attach a file in order to complete a form. This is particularly true for the **Required Attachments** form. To upload a file, click the **Browse** button next to the appropriate field to bring up your computer's file explorer. Find the file to be uploaded and either double-click the file or select the file and click the **Open** button. After the page reloads, you must then click the **SAVE** button to save the uploaded file.

Upload File Formats:

.bmp .doc .gif .jpg .pdf,
.png .ppt .tif .txt .wpd .xls

10MB Maximum Upload Size

Checking For Errors, Error Messages and Stop Signs

When information is not entered correctly within a form or completed in its entirety, or if there are mistakes that violate a business rule, an error message will be displayed in red across the top of the page. You may return to the form and fix errors at any time. These errors must be resolved in order to submit an application. Error messages will populate within a form when you click **SAVE**. If you have already opened a form, a *stop sign icon* may appear next to that form in the **Application Forms Menu** if it hasn't been fully completed, or if an error has occurred on that page.

Even if you don't see any error message or stop signs, there may still be additional information required. Sometimes this occurs when certification pages or other forms need to be completed or saved. On the left side of the **Application / Proposal Menu**, you will see an option for **Administrative Links**. Click the *plus sign* next to that link to expand the options therein. One of the options will be Check for Errors. When clicked, the errors preventing the application from being submitted will be listed for you.

Personnel should check for and correct errors before attempting to submit the application. Once the application is submitted it will go into a read only status, and cannot be changed without a request from NJDOH for modification.

Note: NJ*DOH highly recommends saving the PDF for the entire application to your computer and/or printing for review before submission. **It is also highly recommended to SAVE and PRINT a copy of the application AFTER it has been approved for funding, for your records and for reference offline.***

Viewing, Saving and Printing PDF of Application

On most pages a **View PDF** button will be available at the top or bottom of your screen. Click it to create a PDF file of that section. Then click the **Open** button, to view onscreen or the **SAVE** button to save the PDF to your computer. Locate the file using your file explorer, and open it to print. You can also do this for the application, including all keyed in data and attachments, by clicking the View/Print PDF link in the **Forms Menu**, on the bottom-right of your **Application / Proposal Menu**.
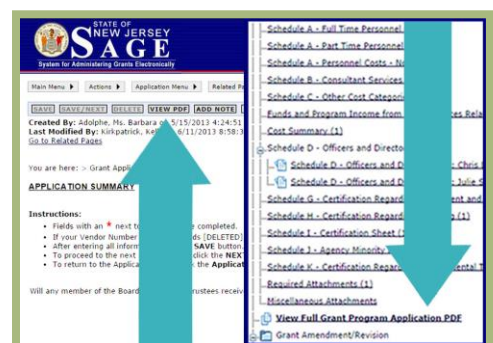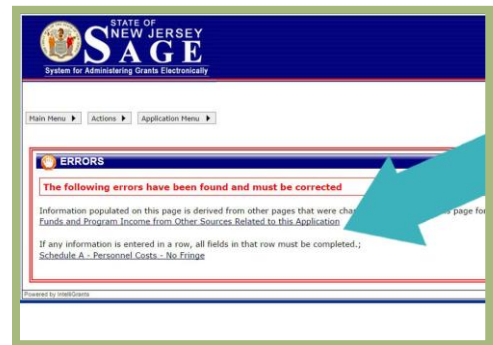
Submitting an Application

To submit the application, an AA or AO must choose the "*Application Submitted*" status in the **Status Management** section of the **Application / Proposal Menu**; click the **Change Status** button to execute the status change and submit the application. If errors exist, you will be prompted to fix them. If no errors exist, a message will prompt you to confirm. You must confirm your action and agree to the terms to complete submission.
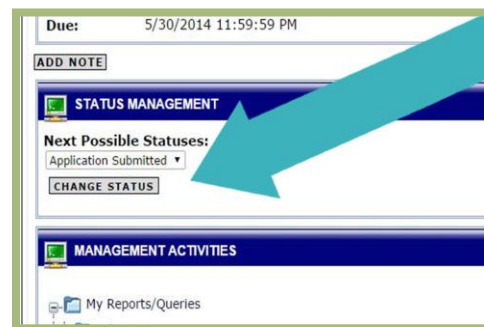
Modifications Required

Sometimes, after an application has been submitted, NJDOH will require modifications to your application. If this occurs, your Grants Management officer (GMO) will change the status of your application to "*Modifications Required*" and unlock specific forms that require your attention. You will be notified if this occurs. Have an AA or AO open the application, make the changes, and reset the status of the application in **Status Management** to submit the changes.

An email will be sent to you acknowledging successful submission of your application.

If you no not have an option to change the status of your application to "*Submitted*" then you have missed the deadline.

The Notes Section in NJDOH SAGE may contain important information from NJDOH regarding your application. Check this section, as well as notes that may exist on individual forms or pages within an application. Most often, an email will also be sent to your address on file in your user profile.

Please continue to the next section for information about the **Notes Section** as well as other forms of communication in NJDOH SAGE.

Communicating with NJDOH (and your agency personnel) in NJDOH SAGE

NJDOH SAGE manages all aspects of your grant, from application to closeout. Throughout your budget period, you will be able to communicate with your NJDOH Program Management Officers (PMO) and Grant Management Officers (GMO) in SAGE. You can also communicate to others within your agency. There are a few areas of the system that are used for vital communications:

- **Notes**
- **System Messages**
- **Email Messages**
- **Status History Notes**

Communication is the Key to Success

It is important to be in good communication with your agency personnel and with NJDOH staff concerning the status of your application, and the daily operations of managing your award. This section shows you how NJDOH SAGE facilitates communication throughout the lifecycle of a grant.

Know your NJDOH grants administration staff.

You will be in closest contact with the **GMO** and **PMO** that NJDOH assigns to your grant program. Once your application is approved, you can find contact information for these representatives in your **Notice of Grant Award (NOGA).** Prioritize communication with them and respond to inquiries promptly to ensure timely processing for your agency.
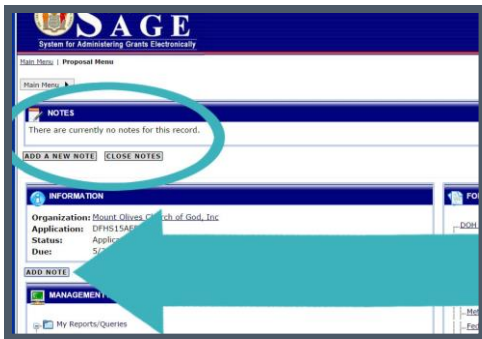
Notes in SAGE

Built into NJDOH SAGE is the ability to add and view notes in an application or form. Notes on the **Application / Proposal Menu** level may contain information different than the notes on a form or page within an application. Notes can be used to communicate with your personnel or with NJDOH staff. Click on the correct **Application Number** to navigate to its **Application / Proposal Menu**, then click **Show Notes** to view notes for this application. Click on the message name to open the note and read its contents.
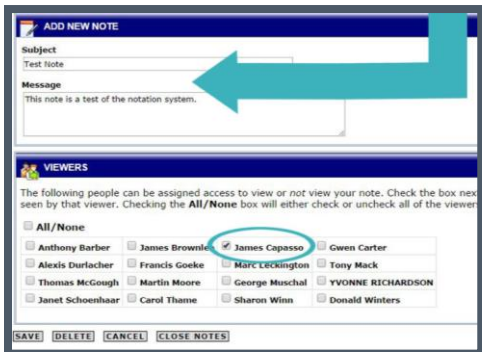

Click on the **Add Note** button to create a note. When composing a note, pay careful attention whose names are checked in the **Viewers** section; be sure that the intended person(s) are selected to be able to view the note, and that others not intended to view the note are not selected. Compose your note to include a subject, in addition to the body of the message, and click **SAVE**. Click **Edit** or **Reply** to edit the note (only available for the user who created the note) or reply to it (available for any user who can view it). Click the **Close Notes** button to close.
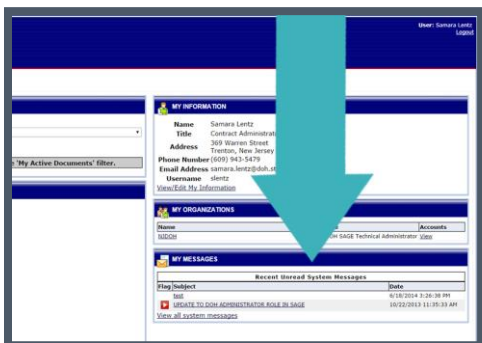
My Messages Section of the Main Menu

In addition to regular email correspondence outside of NJDOH SAGE, you will receive automatic email notifications from the system that will be sent to your NJDOH SAGE inbox and also your external email account listed in your user profile. You can check the **My Messages** area on your account **Main Menu** to view messages. Automatic email notifications and system messages will help you to keep you up-to-date on the progress of your application and related documents.

Automatic Email Notifications

Automatic email notifications may be sent to you periodically throughout the year. These messages will be sent via the system when certain actions are taken in NJDOH SAGE (for example: when your application has been approved) and are intended to inform you of important information that pertains to your agency. Notifications appear in **My Messages** and may also be emailed to the address(s) listed in the user profile of personnel assigned to a grant program or application.

Track your application status, and read **Status History Notes** by click on the Status History link in the **Management Activates** section of your **Application / Proposal Menu**.

Budget Revision and Amendment

Once your application has been approved for funding, changes (if needed) are possible.

A change can be requested to reallocate proposed expenditures, alter the award, or adjust programmatic goals and expectations for your project. To change anything about your award (also referred to as your contract with NJDOH), a Budget Revision / Amendment request must be made in NJDOH SAGE.

Requesting a Budget Amendment / Revision is a 3-step process.

Your agency's AA or AO initiates the request in NJDOH SAGE, completes a justification form and submits it to be reviewed by NJDOH staff.

If your request is approved, you can then make changes to forms and pages to reflect the nature of the request. Finally, you need to submit these changes to NJDOH for review and final approval.

Initiate a Request for Revision / Amendment

The Authorized Official (AO) or Agency Administrator (AA) must log into NJDOH SAGE and open the **Proposal Menu** of the grant / application for which you wish to request a change. Do this from the **Main Menu** in the **My Documents** section, select **All My Documents** from the dropdown menu, click **Go** and click on the appropriate grant number from the list.

From the **Application / Proposal Menu,** Go to **Status Management** (2nd box on left side of screen). Under the **Next Possible Status** dropdown menu, you should see "*Grant Amendment/Budget Revision Request Initiated"* as an option. Select this option and click **Change Status**. Agree to the terms.

1. **Initiate Request**
2. **Fill out justification**
3. **Submit Request**

Note: *Stay in close communication with your GMO and PMO throughout this process to ensure that your request has been completed successfully, and to allow for timely processing.*
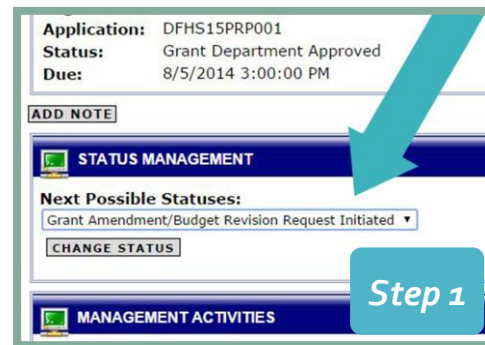
Completing a Revision / Amendment Request Justification

From the **Application / Proposal Menu**, scroll to the bottom of the **Forms Menu** (right side) to find the link for the <u>Grant Amendment/Budget Revision Request</u>. Click on this link to open the form. You must complete the form and provide a detailed line-item justification before it can be submitted to your GMO for consideration. Include the date and name of your request in the **Request Title**. Select what type of request you are making, either **Amendment** (to change funding amount or purpose) or **Revision** (to alter line items within your budget).

Provide a detailed justification that:

    1. Includes the total amount of funds being requested (if applicable)

    2. Lists which cost categories line-items would be changed

    3. Provides a breakdown of how these funds will be used

    4. Includes a detailed narrative explaining what needs to change and why
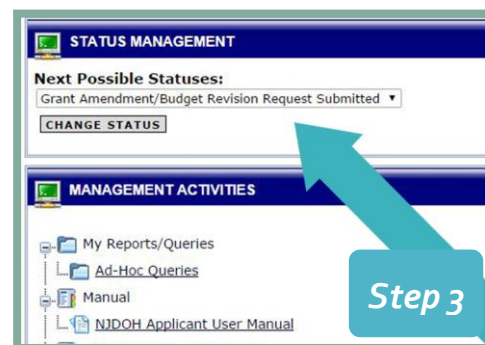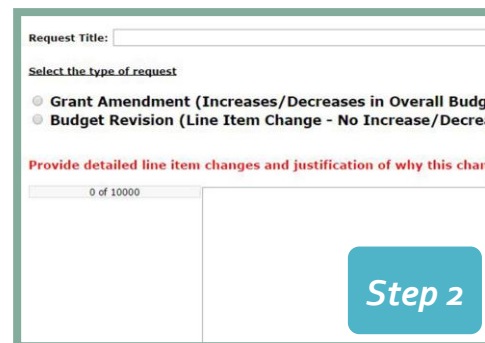
Then, click **SAVE.**

Submitting a Revision / Amendment Request

Once the justification form is completed and saved, this request must be submitted to NJDOH in SAGE by changing the status of the request to *"Grant Amendment/Budget Revision Request Submitted"*. To do this return to the **Application / Proposal Menu** and find the dropdown menu in the **Status Management** section. Select *"Grant Amendment/Budget Revision Request Submitted"* from this list of **Next Possible Status** and click the **Change Status** button. A new screen will appear and you must agree to the terms.

Your request will be reviewed by NJDOH staff. If the request is approved, you will see the status change in the **Status Management** section to *"Grant in Revision or Amendment"* and the pages or forms particular to your request will be unlocked. You can then change the information on these pages or forms to reflect the amendment or revision that NJDOH has approved. Click **SAVE**. Open up the **Cost Summary** and click **SAVE** to populate your changes, then verify that those changes are correct.

Go back to **Status Management** box and select from the **Next Possible Status** the *"Grant Revision or Amendment Submitted"* option and click on **Change Status** button to submit. Agree to the terms to complete the process.

Related Documents: Expenditure Reports, Progress Reports, and Payment Vouchers

Once an application has been approved, your agency personnel must manage funds in NJDOH SAGE and report on how they are spent. This is done with three types of documents: Expenditure Reports, Progress Reports and Payment Vouchers. These documents not only communicate with NJDOH staff regarding your program's progress but also document expenditures so that NJDOH staff can issue your agency payments.

- **Expenditure Reports are reviewed and approved by your GMO**

- **Progress Reports are reviewed and approved by your PMO**

- **Payment Vouchers are sent via GMO to NJDOH Payment Administrators for funding disbursement.**

Note: *Once a grant related document has been properly completed, and checked for errors, the AA or AO must submit that document to NJDOH.*
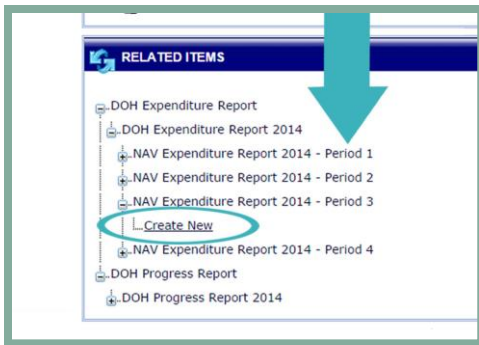
About Related Documents (Related Items)

An AA or AO must initiate or create all documents related to your grant. If personnel have been assigned using the Add/Edit People function they should have access to these related document once they are created. Agency personnel added after related documents are created will need to be added to these existing documents manually, per document, by an AA or AO. Do this by opening the document and accessing Add/Edit People from **Management Activities**.

Expenditure Reports document how you are spending grant funds, and are used as the first step to processing most grant payments. **Progress Reports** are reviewed by Program Management Officer and relate to the programmatic impact of funds expended. **Payment Vouchers** enable NJDOH staff to process a payment to your agency.

Expenditure Reports

Find and select the appropriate application / grant number. The **Related Items** box on the bottom-left should now be visible. In **Related Items** select the Create New link nested under the **Expenditure Report** line for the appropriate period (1, 2, 3, 4, etc.). Complete the **Report of Grant Expenditures** form (link in the **Forms** section to the right of the screen on the **Expenditure Report Menu**) and attach any documents, if necessary. Pay careful attention to how the numbers are calculating in the Expenditure Report to ensure that all figures are entered and calculated accurately. Check the box at the bottom to certify the Expenditure Report and click **SAVE**. When the Expenditure Report is certified, an AA or AO must click on the Report of Grant Expenditures in the **Related Items** box of the **Application / Proposal Menu** to open the **Expenditure Report Menu** and choose the *"Expenditure Report Submitted/Review Required"* status in the **Status Management** section. Click the **Change Status** button. If any errors exist in the report they will appear at that time and must be fixed before it can be submitted. If no errors exist, you will be prompted to confirm your decision and the report will be reviewed for approval by your GMO.

Progress Reports

An AA or AO creates a Progress Report. From the **Main Menu,** find the grant number and click it to open the **Application / Proposal Menu**. Locate the **Related Items** box on the bottom-left of the screen and select the Create New link nested under the **DOH Progress Report**. Complete the **Progress Report Form** and attach any necessary documents. An AA or AO can submit it by selecting the *"Progress Report Submitted/Review Required"* status in the **Status Management** section. Click the **Change Status** button, and if any errors exist in the report, you will be prompted to fix them. If no errors exist, you will be prompted to confirm and agree to the terms.

Payment Vouchers

Once your GMO approves an Expenditure Report they will initiate a Payment Voucher (if applicable) and submit it to your agency for certification. The AA or AO must certify the Payment Voucher in NJDOH SAGE. From the **Main Menu,** look for the **Payment Voucher Requiring Signature** in the **My Active Documents** section. Open the Payment Voucher and scroll to the **Payee Declarations Certification**. Check the box. **SAVE** the page. Cost Reimbursement grants must issue Payment Vouchers to receive payment installments, Advance Payment grants may be required to issue a Payment Voucher at the end of a grant budget period.

Grant Closeout Procedure

All grants feature a close-out letter in NJDOH SAGE, made available to you in the **Forms Menu** of your grant **Application / Proposal Menu** one month prior to the end of your budget period.   You must click on the close-out letter, which contains detailed instructions regarding the close out process for your grant, as well as contact information in case you have additional questions regarding the process.

Your agency will have (30) thirty, (45) forty five, or (60) sixty days to complete the process, and submit all closing documents pertaining to your grant. Refer to your Attachment A contract terms for the closeout deadline associated with your grant program.

If funds disbursed via Advanced Payment exceed final expenditures, the balance must be returned to NJDOH with the submission of the final Report of Grant Expenditures.

If there are any questions concerning this matter, please contact your Grants Management Officer (GMO).

Closeout Documents:

- A final **Report of Grant Expenditures**
- A final **Payment Voucher** *(if applicable)*
- **Statement of Equipment Inventory**
- **Program Income Statement** *(if applicable)*
- **Statements of Royalties / Inventories / Copyrights** *(if applicable)*
- **Statement of Interest** earned from Advance Payments if over $250 *(if applicable)*
- A final **Progress Report**

Note: *Closeout documents that shall be required, if applicable, are listed to the left. You must check your closeout letter or speak with your GMO and PMO to confirm which of these documents apply to your agency's contract with NJDOH.*

Need assistance with closeout? Just ask your GMO. You can also reference grant documents in the *Forms Menu* for more information.

Contacting the NJDOH SAGE Help Desk

On your login screen (shown below) there are **Helpful Links** located to the left of your screen. The first link, SAGE Help Desk and Support Services brings you to a page featuring help desk information for each State of New Jersey Department. Click on the Help Desk link under **Department of Health** for current NJDOH Help Desk contact information.